VBA AVAILABILITY PLAYBOOK

Office of Field Operations
DEPARTMENT OF VETERANS AFFAIRS

Contents

Revision History

Date	Update
11/19/2019	Initial Publication

Purpose

This playbook provides guidance for utilizing excluded time to account for non-creditable activities.

Updates to this guidance will be provided as needed.

Who does this policy apply to?

The guidance in this playbook applies to the following individuals from the Compensation, Pension, and AMO business lines that use WATRS:

- VSRs on production standards
- RVSRs on production standards

Timeliness of Entries

Employee Entry

Employees are encouraged to input entries as timely as possible after using excluded time of any type. When possible, employees should input excluded time requests in WATRS in advance. If local policy exists requiring number of days to enter time, local policy should continue to be followed until directed otherwise.

Supervisory Approval

Supervisors must address (approve or deny) pending excluded time entries within three business days of employee entry.

Supervisors can reference the Pending Requests Dashboard in WATRS Analytics to review entries that are awaiting approval.

Accurate Categorization of Entries

Employee Responsibility

The employee must ensure the reason and sub-reason accurately reflect the activity that the employee spent time doing. Employees should use this playbook as guidance of what reason should be used. If the employee is still uncertain, he or she should consult their supervisor.

Supervisor Responsibility

The supervisor must ensure the entry accurately reflects the employee activity prior to approving. If a more appropriate reason is sub-reason are available, the supervisor should not approve the request and communicate the necessary change to the employee.

Reasons for Entry

WATRS provides two levels of reason categories: reasons and sub-reasons. The reasons consist of the highest-level grouping of all excluded time entries. Sub-reasons provide more detail about the particular activity.

Entries using the following reasons may be approved or denied by a first line supervisor:

- Quality and Training
- Meetings and Performance Management
- Other
- Leave
- Union Time
- Special Project time related to national initiatives (further defined below)

Entries using the following reasons must be approved or denied Division-level leadership or designee (no lower than assistant):

- Special Project – Any Local Project

Guidance for special project entries addressed below.

Leave

Entries in WATRS for leave should follow closely to the type of leave entered in VATAS and the time and date of leave should match exactly in the two systems.

- Annual
- Sick
- Leave Without Pay (LWOP)
- Military Leave
- Administrative Leave

Supervisors can use the WATRS-VATAS Validation Dashboard to easily audit accuracy of VATAS and WATRS entries.

Employee Assistant Program (EAP) and Leave

Any leave related to the utilization of the Employee Assistant Program (EAP) should use the same sub-reason in WATRS as input into VATAS. Any additional questions regarding EAP activities please reference the AFGE Master Agreement Article 15, Section 6 & 7.

Family and Medical Leave Act (FMLA)

When an employee is using Family and Medical Leave Act (FMLA) the leave category chosen in WATRS should match what is input in VATAS (sick leave or LWOP). Any questions regarding FMLA reference the AFGE Master Agreement Article 35, Section 16.

Quality and Training

The available quality and training reasons consist of the following:

- National Training
- Local Training
- Leadership Development
- National Training Calls
- National Training- New Employee IWT Participant
- National Training- Challenge Participant
- National Training- Challenge Instructor
- Training-Instructor Prep and Delivery
- Skills Certification Training/Preparation
- Skills Certification Test
- Consistency Study
- Providing Mentoring
- Receiving Mentoring
- Quality- Error Rebuttal
- Quality-Completing 2nd Signature Peer Review
- Quality-Completing 2nd Signature Review-Manual directed

Annual Training Hour Limitations

Training excluded time requests is limited to employee receiving 45 hours or training per year per. WATRS entries using the following sub-reasons will count towards the annual 45 hours:

- National Training
- Local Training
- Consistency Study
- Skills Certification Training/Preparation

Training hour requirements per business line:

	Hours		
Training Type	**Compensation**	**Pension**	**Appeals**
Nationally Mandated Business-Line Specific Training	15	20	20
Locally Mandated Training	25	20	20
General Employee Annual Mandated Training • *Active Threat-1 hr* • *Continuity of Operations – 0.5 hr* • *Government Ethics – 1 hr* • *Prevention of Workplace Harassment/No Fear – 1.5 hrs* • *Privacy and Info Security – 1 hr*	5	5	5
Total Annual Training Hours/Employee	**45**	**45**	**45**

New Employee Training

Training for employees new to their position, such as IWT or Challenge **do not count** against the 45-hour annual limitation. As stated at the beginning of the document, this limitation only applies to employees that have completed the initial training status and are on a production standard.

Quality and Training Sub-Reasons

When entering entries for training time, the following guidance should be used to determine which sub-reason to select:

Sub-Reason	When to Use	Entries Count Towards 45 Hours?
National Training	National Training required by business lines and annual agency training requirements.	Yes
Local Training	Training required by station-level management	Yes
Consistency Study	Time spent completing consistency studies when requested by business lines	Yes
Skills Certification Training/Preparation	Includes training and preparation related to Skills Certification	Yes
Leadership Development (LEAD, LVA, LEAP, ELP, Local Programs etc.) Activity	Includes participation in leadership development activities (limited to LEAD, LVA, LEAP, ELP, or other local leadership development programs)	No
National Training Calls	Homeless, MST or any other calls that are held by Central Office entities and request participation by VSR/RVSR SMEs/coordinators.	No
Challenge Training: • National Training - New Employee IWT Participant • National Training - Challenge Participant • National Training - Challenge Instructor	To be used when an employee is attending challenge (IWT and residency) or an instructor at challenge	No
Training - Instruction Prep and Delivery	To be used when employee is preparing or delivering training to peers.	No
Skills Certification Test	To be used to record time spent taking the skills certification test	No

Mentoring: • Providing Mentoring • Receiving Mentoring	Time spent providing or receiving mentoring	No
Quality • Quality - Error Rebuttal • Quality - Completing 2nd Signature Peer Review • Quality - Completing 2nd Signature Review-Manual directed	• Employee completes quality error rebuttal that results in error being overturned. • To be used when requiring 2nd signature review.	No

If a TMS number is provided for the training, it should be entered in the employee comments in WATRS.

Business Line Training Information

Additional training information for each business line can be referenced using the following links:

Business Line	Link
Compensation	Compensation Service National Training Curriculum (CSNTC)
Pension	Pension management Center National Training Curriculum (PNTC)
Appeals Management Office	AMO Training Site

Requesting Additional Training Time

Division level leadership may request additional training excluded time to the Regional Office Director. Requests should include as part of a defined action plan. Directors may approve up to 10 hours per person per year. Requests for training in excess of the Director's approval authority must be approved by the District Director.

In the event of additional training needs as a result of IG/GAO audits or legislative changes, communication about additional hours will be provided in the training guidance release from the Business Line or Office of Field Operations.

RO Directors are responsible for reporting and providing justification to their District Office for any employees who are on-standards (not in training status) and use in excess of 45 hours of training excluded time. The list should break out each employee and document the total hours of training and the justification for the training.

At the time of publication of this playbook, tracking tools and improved WATRS categories to better monitor training usage are under development and will be provided when available. Communication will be provided to the field and this playbook will be updated accordingly.

Special Projects

The special project reason includes two sub-reasons: National Special Projects and Local Special Projects.

National Special Projects

All National Special Projects should be categorized using this sub-reason. Only projects assigned by Central Office Business Lines or Office of Field Operations should be categorized here.

Examples of National Special Projects:

- National IPC duties as assigned from OFO or AMO
- System testing
- OIG/GAO Activities that do not result in creditable transactions (e.g., claim reviews).

When using this sub-reason, the employee should provide a comment that provides a brief description of the task (e.g., "VBMS testing", "Mail processing", etc.).

National Special Project-System testing should be used when a user is involved in regular system testing, such as testing associated with VBMS deployments, or user centered design sessions with VBMS System Developers and other VBACO SMEs. This does not include other system testing related to other listed National Projects.

Local Special Projects

Non-creditable work that is done at the direction of local management should be categorized using this sub-reason.

Examples of local special projects include:

- Outreach/Public Contact Activities
- System Super User Activities
- SME Activities (i.e., JSRRC, MST coordinator, homeless coordinator, any other duties a designated coordinator might engage in that does not result in transaction credit).
- Timekeeping
- Activities related to hearings

Local Special Project Annual Hour Limitations

Veteran Service Centers/Pension Management Centers are allocated **1.5 percent** of their regular annual hours (VSR and RVSR combined) as shown by the Leadership Employee Performance Report (LEPR) for the prior fiscal year. Regional Office Directors may approve up to **2 percent** of Regular Hours if additional hours are needed. Anything in excess of 2 percent should be submitted to the District Office for approval.

Requests should document the need for the time, anticipated hours, number of resources that will be using the hours (number of VSRs and RVSRs) and expected results from time spent.

Local Special Project Entry Approval Requirements

All local special projects excluded time requests must be approved by the Veterans Service Center Manager/Pension Management Center Manager (VSCM/PMCM) or designee (no lower than Assistant). All Special Projects time must be approved for a specific purpose and limited time. No blanket special projects excluded time should be authorized. Local special projects should include a comment identifying the specific project.

Union Time

Union Time (Duty and Official) should only be used by **Union officials/representatives** to record the use of Official time and Duty time. Supervisors are responsible to ensure the correct reason and sub-reason is selected.

Additional information regarding union time can be found in Article 48 of the AFE Master Agreement, OFO Letter 20F-12-07, and 5 U.S. Code §7131.

If an employee is meeting with union representatives, the entry should be categorized in Meetings and Performance Management.

Meetings & Performance Management

This category is used for approved meetings with management, union, or other support entities. To expand the understanding of when employees should use this reason a few examples are provided below.

- Division Meetings to include townhalls and award ceremonies
- Team Meetings/Huddles
- Supervisor Meetings/One-on-One meetings with supervisor
- Special Events such as CFC, Central Office Webinar events (e.g., USB webinars), or other employee engagement events
- Union Meeting
- All other Meetings with management, human resources, support services, etc.

Other

Employees should utilize the Other reason category when one of the following apply:

- Technology-related situations (such as system updates or connection issues)
- PIV activities
- Surveys
- Employees Moves
- Emergency Preparedness
- Telework travel (traveling to or from the office during tour of duty hours)
- Other

Important to note that the Other-Other reason should only be used when no other, more appropriate excluded time reason exists. This sub-reason should be used as sparingly as possible. **Supervisors should always review entries using the Other/Other categorization to ensure validity of entry and accuracy of categorization.**

Credit Hours Taken

Employees should use this reason when using credit hours previously earned.

Compensation Time Taken

Employees should use this reason when taking compensation time previously earned.

Excluded Time due to System Outages

System outage may prevent an employee from completing creditable transactions. If this happens and the employee completes training or, if trained, works in the IPC Mail Portal during the duration of the downtime the excluded time should be recorded using the following guidance:

Completed Training - For recording the excluded time in WATRS employees should utilize the appropriate training sub-reason. To track the training time being due to system outages, the employee should enter #Tech in the employee comments section.

Completed Mail Processing: For recording the excluded time in WATRS employees should utilize sub-reason National Projects. To track the special project time, the employee should enter #Tech in the employee comments section, and supervisors should validate the entry is appropriately input.

Reporting & Tracking Tools

Management should leverage the Supervisor EPR (SEPR) Station Time & Leave Hours tab to track the number of hours per sub-reason utilized by each employee.

At time of publication of this playbook, additional tracking tools are in development. When tools are completed, this playbook will be updated and communication will be provided.

Central Office Roles and Responsibilities

Central Office entities must ensure that excluded time guidance is included when communicating activities that will divert VSRs and RVSRs away from non-creditable claims processing activities. Guidance should reflect whether excluded time is or is not available to be input and, if it is available, what it should be categorized as.

Appendix A - WATRS Reason/Sub-Reason Summary

EXCLUDED TIME REASON	SUB REASONS AND EXAMPLES

Leave
 	
This category is used to input leave use. The employee will choose the leave type taken from the drop-down box in WATRS.
 	
NOTE: All leave will be input in this category.
	• Annual leave
	• Sick leave, to include
	  ○ Bereavement leave
	  ○ Family and Medical Leave Act (FMLA)
	• Leave without Pay (LWOP)
	• Military leave
	• Administrative Leave, to include
	  ○ Court or Court related services (e.g. jury duty)
	  ○ Registration/Voting
	  ○ Blood, Bone Marrow, Organ donor leave
	  ○ For employees without a telework plan, office closures due to inclement weather

Quality and Training
 	
This category is used to input time taken for quality and training activities. The employee will choose the training or quality type from the drop-down boxes in WATRS.
 	
NOTE: When choosing National or Local training, please include the TMS number, e.g. "10176", in the TMS number in the employee comments box.
	• National Training
	• Local Training
	• Leadership Development activities (ex. LEAD, LVA, LEAP, ELP, Local programs)
	• National Training Calls- Homeless, MST or other calls held by Central Office
	• National Training- New Employee IWT Participant
	• National Training- Challenge Participant
	• National Training- Challenge Instructor
	• Training- Instruction Prep and Delivery
	• Skills Certification Training/Preparation
	• Skills Certification Test
	• Consistency Study
	• Providing Mentoring
	• Receiving Mentoring
	• Quality Rebuttals, where the error is overturned following an employee's rebuttal.
	• Quality -Completing 2nd Signature Peer Review- for new employees or employee requiring 2nd signature for quality reasons.
	  ○ Mentoring
	  ○ QRT 2nd Signature Review
	• Quality-Completing 2nd Signature Review-Manual Directed
	  ○ TBI or other Specific Case 2nd Signature Review

Special Projects *This category is used to input time spent completing assignments outside the normal scope of assigned work or not recordable in VBMS. A brief description should be entered in the remarks section describing the duties completed and claim number(s) (when applicable).* ***All Local Special Projects excluded time request must be approved by the Veterans Service Center Manager/Pension Management Center Manager (VSCM/PMCM) or designee (no lower than Assistant).***	• National Special Project (#) • National Special Project-IPC Duties • National Special Project-System Testing • National Special Project- OIG/GAO Activities • Local Special Project- Outreach/Public Contact Activity ○ Outreach/Community Event, e.g. Town Hall, Homeless Stand Down, Claims Clinic • Local Special Project- System Super User Activities ○ Super User/Key User Responsibilities (WATRS, VBMS, etc.) • Local Special Project-SME Activities ○ Additional development duties require SME knowledge (i.e., JSRRC, MRS, Homeless claims, MST claims, HAC, Women's Vet Coordinator, CHMPVA coordinator, and all other coordinator duties) **NOTE:** Only used when transactional credit is not awarded based on actions. • Local Special Project- Timekeeping • Local Special Project-Activities Related to Hearings
Union Time **This category is used strictly by Union officials/representatives to record use of Official Time and Duty Time. The Union member will choose from the drop-down boxes under Official Time or Duty Time in WATRS.** **NOTE: See Article 48 of the AFGE Master Agreement, OFO letter 20F-12-07, and 5 U.S. Code § 7131** **Employees: See "Meetings" for representational meetings with a union official.**	• Official Time, to include ○ Representational Duties, such as: • EEOC • MSBP • Other forums where the union official represents employees before a third-party ○ Collective Bargaining Negotiations ○ Union Travel ○ Union Training ○ Processing Revocation of Dues Withholding • Duty Time, to include ○ Local committee meetings, such as: • Occupational Safety & Health • Equal Employment Opportunity ○ Local Supplemental Agreement negotiations ○ New Employee Orientation
Meetings and Performance Management **This category is used to input excluded time for attending meetings and time spent with a supervisor/manager regarding performance, e.g. monthly performance meetings.** **The employee will choose from the drop-down boxes in WATRS.**	• Team Meetings/Huddles • Division Meetings ○ Town Hall/Stakeholder/award ceremonies • Supervisor Meetings (one on one meeting with supervisor) • Special Events ○ Retirement, CFC, and other celebratory events • Union meeting (ex. An employee's meets with a union representative for any reason. Note: Employee should not use Union Time reason) • All other Meetings with Management, EEO, Support Services etc. ○ Human Resource meeting ○ LRAC ○ EEO ○ Support Service

	○ Job promotion or changes activities (interviews or written exercises)
Other **This category is used to input excluded time which does not fall into any other category. The employee will choose from the drop-down boxes in WATRS.** **NOTE: For IT issues under Technology, enter the Ticket Number provided by the IT Help Desk within Employee Comments** **Important to note that the Other-Other reason should only be used when no other, more appropriate excluded time reason exists.**	• Technology, such as: ○ Software, hardware, or system outage ○ Time spent with local IRM to resolve issues ○ Software, hardware, or system updates • PIV activities (application, fingerprint, new card/card replacement) • Surveys (AES, GSA tenant, etc.) • Employee Moves • Emergency Preparedness (Fire/Safety Drills, etc.) • Telework—emergency travel to office • Other
Credit Hours Taken*	• Credit Hours Used
Comp Time Taken*	• Comp Time Used

Appendix B – Employee Comment Key Word & National Hashtag Reference Guide

Key Word/Hashtag	Definition	Date Implemented
#Tech	Should be used when an employee is engaging in another activity (e.g., training, mail processing) due to system outages.	11/19/2019
#SB	Should be used by Denver RO employees when inputting excluded time related to non-creditable activities for spina bifida claims.	11/19/2019

Appendix C – National Special Project Time Tracker

Detailed information regarding instances where "National Special Project (#)" is used.

Sub-Reason	Date Start	Date End	Description of Excluded Time	Business Line